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ABSTRACT

An environmental scan was conducted to assess the demographic and economic conditions in Passaic County (New Jersey) as a way of providing information helpful to Passaic County Community College (PCCC) in its planning activities. The environment scan focused on immigration patterns, job creation and loss trends, business hiring needs, PCCC enrollment patterns, and changes within the foreign-born student population at PCCC. Results for the county's immigrant and impoverished individuals indicated that both groups shared needs for obtaining information on locating and utilizing medical and legal services, transportation, literacy programs, recreational programs, and substance abuse programs. The economic data show consistent expansion of the health industries and the beginning of expansion in some segments of the non-durable manufacturing and service fields in the county. The durable goods industries began to decline in 1990 and continued to decline through 1992. A survey of two local chambers of commerce found that nearly 28% had hired PCCC students or graduates, and that 64% of employers used PCCC for employee training. The diversity of the county's population was explored through census data, periodical articles, and student reports of birthplace and residence, revealing influxes from India, Pakistan, the Philippines, Eastern Europe, the Middle East, the Caribbean, and South America within the county and the college. Studying high school and PCCC enrollments revealed that a greater percentage of newly graduated students had enrolled in recent years, perhaps because of relationship-building efforts with high school counselors, economic conditions, and indecision about what to study on the part of high school seniors. (ECC)

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ED 364 261

ENVIRONMENTAL SCANNING

ON A

SHOE-STRING BUDGET

By

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PREFACE

The purpose of this document is to provide a basic understanding of the environment within which Passaic County Community College operates so that strategic and operational planning can be guided by informed judgements. That environment consists of educational, social, technical, demographic, economic, and political factors outside of the institution that are constantly changing. There are also internal influences such as faculty and staff attitudes, student interests, and financial and governance factors which are also in states of flux. Keeping abreast of the changes in all of the domains is an arduous task. Moreover, some aspects of the environment are more quickly altered than others, and the effects of the alterations are differentially felt--some are quite profound, others trivial. The "trick", then, is to be able to identify the changes that are going to be slow and continuous over a number of years or relatively rapid, judge their impacts, assess them in regard to the Mission and Goals of the Institution, and adapt accordingly.

This report provides "snapshots" of several features of the external environment that made up Passaic County during the years 1990-1992. There are, to be sure, many qualities of the total environment that have not been addressed, and many that have, have evolved within the dynamic conditions that surround the College. Because there are so many components to consider, performing an environmental scan should be seen as a continuous process rather than a unique activity that is periodically performed. What is more, scanning activities should not be considered the province of one office or one group, but a function of every unit within the institution.

The information which follows is intended to stimulate further research which will aid and provide some guidance for enrollment planning, program review and development, and fiscal and human resource management. Ideally, it represents but the first step in formalizing an on-going college-wide process of environmental scanning.

Acknowledgements

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SUMMARY

The environmental scan was performed to assess the demographic and economic changes occurring within Passaic County. The hope is that the information it contains will help Passaic County Community College in its planning activities to better serve the educational needs of the County. It is comprised of the results of examinations of immigration patterns and economic data including job creation and loss, business and industrial personnel needs--specifically in entry-level positions, and high school enrollment-graduation-PCCC enrollment activity. Included also are observations of the changes that have taken place within the foreign-born student population at the College.

One striking finding pertains to the immigrant populations and some of the impoverished members of the County. Both groups share a need for information about how and where to obtain medical and legal services; they need the descriptions and locations of literacy and alternative educational programs for children and adults; they need to know the locations of recreational facilities and substance abuse programs; and they need information concerning public transportation. It was found that these problems are compounded by the existence of language difficulties.

The economic data show that the health industries have been continuously expanding and that some industries within the non-durable goods manufacturing and service segments of the county's economic structure have begun to expand. The data also reveal that the durable goods industries began to decline in 1990 and had continued to decline through 1992.

By looking at the wide array of birthplaces reported by current students at the College and studying the changes that have taken place over the last five years in the numbers from the various geographic locations within the student body, and by examining documents such as periodical articles and census reports, the diversity of the County's population as it has been represented in the College, was explored. Influxes from countries such as India, Pakistan, and the Philippines and general areas such as Eastern Europe, the Middle East, the Caribbean, and South America were observed within the County and the College.

From studying high school enrollments/PCCC enrollments it was observed that a greater percentage of newly-graduated students had enrolled in recent years. Several explanations for the observation that more tradiontionally-aged students had enrolled at PCCC in the last few

years were developed. Possible reasons include relationship-building with the high school counselors, economic conditions, and indecision about what to study on the part of the high school seniors. It is probably not one but a combination of those factors that are contributing to the observed result.

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Part I: Immigration Analysis

METHOD

During the spring and summer of 1992, a telephone survey was conducted of local, state, and national health organizations in order to try to answer questions about immigration into Passaic County. The intent was to identify the educational needs--linguistically and otherwise--of that segment of the County's population and better serve those people. A fundamental assumption was that Passaic County Community College was already serving a large migrant population that had linguistic difficulties, but the degree to which the characteristics of that segment of our student population was changing, if at all, was unknown. Some of the organizations contacted were the Center for Disease Controls, the National Statistics Office of the National Academy of Sciences, and the World Health Organization. None of them were able to provide the desired information. Basically, the question that was put to these organizations asked if any particularly anomalous diseases or illnesses were being reported within Passaic County, especially diseases or illness endemic to other parts of the world. The assumption being that a sudden rise in the incidence of one of those maladies would suggest an influx from that (or "those") other locale(s). Unfortunately, none of the aforementioned organizations could provide the requested information. They did, however, state that the N.J. Center for Health Statistics may be able to help. Other recommendations as potential sources of information resulting from the telephone survey included the Census Department, the Urban League, and the Immigration and Naturalization Service. But, those organizations, too, were unable to provide data on immigration into the county.

The N.J. Center for Health Statistics was able to provide some meaningful insights, as was the N.J. State Data Center (which utilizes a great deal of the data gathered by the Census Department), and the International Institute of N.J. The combination of information obtained from those groups and elements from reports produced by the United Way of Passaic Valley, the Human Services Advisory Council (HSAC) Planning Committee, and articles from *The New York Times, The Star Ledger,* and *Business Week* resulted in a basic understanding of the needs of the newly-arrived migrants in Passaic County. In the process of doing this research, it was discovered that some needs are not of a linguistic nature and are also required by the impoverished English-speaking county residents--however, the inability to speak and understand

English serves to exacerbate these problems.

RESULTS

An interesting, but obvious observation was related by the representative of the International Institute. He recommended that the best way to assess from which countries immigrants would be coming is to discern which countries were already represented within the population of interest. The underlying premises being that people would tend to re-locate in areas where: 1) there are already people similar to them; and, 2) they may have relatives or friends who have preceded them.

Anecdotal evidence and personal observations concerning the more southern regions of Passaic County led the International Institute's representative to the conclusion that the immigrant population was made up largely of people from the Caribbean, South America, the former Soviet Union and Eastern Europe, India, Pakistan, and the Philippines. He also noted that there were "pockets" of people of Arabic and Indo-Chinese origin in the Northern New Jersey area (i.e., Essex, Morris, Passaic, and Union Counties). The latter point was reinforced by conversations with the spokesman from the Center for Health statistics.

The International Institute's agent also said that his information, which was compiled from a variety of sources, showed that the "down-county" areas of Passaic County (mostly Clifton, Paterson, and Passaic) were receiving migrants from the former Soviet Union , South America, the Caribbean, the Philippines, India, and Pakistan. When asked what he thought their needs were he said that he felt many would be interested in reducing their accents when speaking English. He also said that there appears to be a great of competition between people coming from India and the Dominican Republic for "affordable" housing. The validity of that statement can be inferred from an article that appeared in the *Herald News* on Sunday, October 11, 1992, that told how the Dominican population in Passaic County increased "fivefold" in the period between 1980 and 1990. The article continued by saying that the Peruvian and Indian populations "tripled", the Colombian, Filipino and Chinese doubled, and that there has been a large influx from Haiti. This is further substantiated by a report that appeared in the *N.Y. Times* (July 1, 1992; p. B1) that disclosed that the immigrant population from the Dominican Republic was the largest migrant population coming into N.Y.C. between 1983 and 1989.

The Haitian population, although not as large as the others, has been growing since the political problems in that country began to intensify, during the last months of 1991. Like many of the other immigrant populations, they have language and transportation problems. The reasons many Haitians have come to Passaic County (mostly to Paterson) include the searches for political asylum and jobs, and the hope of being reunited with relatives and friends who preceded them and established the Haitian community in Paterson.

The Arabic population is another established ethnic presence in Passaic County that is located primarily in Paterson and Clifton. The establishment of this community dates back to the Paterson silk strike of 1913 and has continuously grown ever since. People from Syria and Lebanon were the first to arrive and have been followed by Egyptians, Jordanians, and Palestinians; and Turks, Ciricassians, and people from some of the other countries of North Africa.[1]

At PCCC

In the effort to identify the foreign born students that PCCC has been serving in the recent past, a table of the birthplaces of PCCC students covering the past five years was developed. It can be seen that the foreign country with the highest representation is Peru followed by the Dominican Republic, Colombia, and Puerto Rico, in that order. The countries that have shown some of the greatest changes in proportions over the past five years--in no specific order--are: Peru, the former Soviet Union (i.e., Russia, Ukraine, and U.S.S.R.--see table), the Philippines, Jamaica, and Africa (as an aggregate--Nigeria and Ethiopia being the two African countries most highly represented).

DISCUSSION

Some of the more serious needs of the migrant and impoverished populations, as expressed in the conversations with the Center for Health Statistics representative and in the United Way and HSAC publications, indicated a need for information concerning where various types of services can be obtained. These services included things like where and how to obtain medical services--inpatient and outpatient, referral services, alternative educational services for

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[1] The information relating history and influx of migrantion was taken, for the most part, from the *Herald News* series published during the Fall of 1992.

BIRTHPLACE OF FOREIGN BORN STUDENTS

	1992	1991	1990	1989
Indo-China	5	2	6	4
Vietnam	2	1	3	2
Thailand	2	1	3	2
Malaysia	1	0	0	0
Afganistan	2	5	5	4
India	87	99	65	55
Pakistan	4	3	4	4
Bangladesh	24	18	15	10
Indonesia	0	1	0	0
Phillipines	61	36	36	19
Singapore	1	1	0	0
Taiwan	2	3	5	2
Hong Kong	0	2	0	0
China	4	6	6	0
Japan	1	1	0	2
Korea	6	9	11	4
Africa	45	30	25	17
Algeria	1	0	0	0
Bengali	0	0	1	1
Egypt	7	1	6	3
Ethiopia	11	6	3	2
E. Africa	1	1	2	0
Ghana	2	3	1	0
Kenya	4	2	6	0
Liberia	1	0	1	1
Libya	0	0	0	1
Niger	0	0	1	0
Nigeria	14	13	1	6
Sierra Leone	0	1	1	1
Sudan	1	2	2	2
W. Africa	1	0	0	0
Zambia	1	1	0	0
Tanzania	1	0	0	0
East Europe	75	31	26	15
Austria	2	2	0	0
Bulgaria	0	0	0	0
Czechoslovakia	0	3	0	0
Hungary	3	0	2	0
Poland	24	18	13	9
Romania	1	1	1	1
Russia	6	0	1	0
Ukraine	11	0	0	0
USSR	22	4	3	1
Yugoslavia	6	3	6	4

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West Europe	17	20	19	16
England	2	7	5	5
France	1	0	1	1
Germany	4	6	3	2
Italy	3	3	4	4
Portugal	1	1	3	3
Spain	6	3	3	1
Middle East	115	96	101	99
Egypt*	7	1	6	3
Iran	4	1	3	1
Israel	9	10	17	9
Jerusalem	0	0	2	1
Jordan	35	38	34	35
Kuwait	2	4	2	2
Lebanon	11	6	4	7
Libya	0	0	0	1
Palestine	1	1	1	0
Saudi Arabia	2	1	1	0
Syria	29	21	27	27
Turkey	14	12	12	12
West Bank	1	1	2	1
Caribean	626	547	423	350
Antigua	0	0	0	1
Guyana	17	9	7	5
Haiti	28	23	31	9
Dom. Rep.	264	264	226	195
Cuba	12	12	14	6
Trinidad	5	1	1	6
Tobago	2	2	1	0
Barbados	3	2	2	0
Bahamas	2	1	2	0
Indies	1	1	1	0
Jamaica	121	82	61	34
Puerto Rico	170	150	76	93
Virgin Island	1	0	1	0
St. Lucia	0	0	0	1

*This is included in "Africa", also inclusion here is for parity with association of Egypt as an Arabic country.

Mexico	22	16	20	21
South America	708	693	616	559
Argentina	10	11	5	10
Bolivia	4	5	6	1
Brazil	6	6	9	11
Chile	6	5	3	3
Colombia	208	214	215	194
Ecuador	43	50	38	35
Paraguay	0	0	1	0
Peru	427	399	331	298
South America	1	0	0	0
Uruguay	1	0	0	2
Venezuela	2	3	8	5
Central America	62	60	59	54
Costa Rica	10	12	8	16
El Salvador	23	17	25	20
Guatemala	8	9	12	7
Honduras	9	7	6	8
Nicaragua	7	10	5	2
Panama	5	5	3	1
	1860	1678	1436	1232

children and adults, literacy programs, recreational programs, help in dealing with drug and alcohol abuse, and information describing the kinds of available public transportation. An interesting footnote to the surveys conducted by the United Way and the HSAC is that, while they both utilized different sampling and surveying strategies, their findings were remarkably congruent.

Language Barrier

For immigrants, problems associated with inabilities to understand English create a language barrier that intensify the aforementioned problems. Wherever they go, they need a translator because they are unable to communicate in English, and this causes frustration when information concerning solutions to the aforementioned problems are provided. They need to bring an interpreter when they are looking for a job; when they go to open a bank account; or, when they look for health care or legal assistance.

Immigrants are expected to be able to communicate in English when they go for a job because the nature of the industrial base of the county has been changing. Historically, the base has been manufacturing, but it is becoming more service oriented and factory jobs are disappearing. This has had the effect of exacerbating the language problem because in order to function in a service based environment, one is expected to be able to communicate in English. Communication was not such a necessity in the past, when manufacturing and factory jobs provided employment for the newly-arrived immigrants. Further, many of these problems are compounded when the immigrant leaves the urban environment for the suburbs, where even fewer services and resources in their native tongues exist.

Although bilingual programs are beginning to be implemented in some of the schools in the County, Spanish is usually the second language. But, a *Herald News* article that appeared on October 15, 1992, paraphrased a Paterson school official by stating that over 35 languages are spoken by the students within the Paterson school system (that means that at least that many languages are spoken by adults in the municipality of Paterson!). The school system official stated that a bilingual course is usually implemented if there are 20 or more students who speak that language in the school. So far they have developed programs in Turkish, Arabic, and Bengali.

Within Passaic County, 31% of the population reported speaking a language other

English at home (according to the 1990 Census), and 16% reported that they did not speak English "very well". Within the cities of Paterson and Passaic the percentages were 46% and 57%, respectively, reporting that they spoke a language other than English at home; and 24% of Paterson's population reported that they did not speak English "very well". In Passaic, 32% reported that they did not speak English "very well".

Part II: Economic Indicators

METHOD

Another phase of the environmental scanning activities entailed compiling employment data that have been collected since 1988. These data have been supplied monthly by the N.J. Department of Labor in a publication entitled *Employment and the Economy*. They represent the numbers of positions on nonfarm payrolls within the county and the number of county residents who are unemployed.

Payrolls

A problem arose when it was realized that the terminology used in catagorizing and reporting the data changed in January 1990. Therefore, the present analysis utilizes only the data from January 1990 through November 1992. Unfortunately, the reporting frequency in which these data are reported has also changed. Instead of being published monthly they are now published quarterly. For that reason, the current report does not contain the data for December, 1992, through May, 1993.

The Department of Labor published two caveats along with the data. The first warning concerns making month-to-month comparisons. They recommended using the complementary data concerning the number of positions in a particular payroll area during the same month in the preceding year. These data were published along with the monthly data, on the same page. In the this way, annual comparisons of employment activity could be made.

The second warning addressed the facts that some individuals may have held more than one job in the county, and that people from outside of the county tend to commute to jobs within the county. Both of these sources inflate the statistics and cause the numbers of people on payrolls in the county to not reconcile with the employment rate of county residents.

Labor Force Data

The employment rate is a count of the number of persons living in an area who are employed. The unemployment rate percentage is the result of the count of the number of persons unemployed divided by the total number of persons living in the county, multiplied by 100. It does not address age or whether an individual is actively seeking a job; it has not been seasonally adjusted. As such, it is a gross measure, but one that the Department of Labor uses in some aspects of federal reporting. Within the context of this report, the methodology is consistent with itself and the data are reliable.

The current analyses track the monthly payroll activity and the unemployment rate data from January 1990, through November 1992 (except for the months of April and May 1990, which are missing), the last month for which these data were made available. The problems concerning month-to-month comparisons that the Department of Labor warned against are not applicable since the data are followed longitudinally through a period of approximately three years. Some definite trends become evident in viewing the data that comprise the current graphs.

RESULTS

The data were placed into seven line graphs. The first (Figure 1) consists of all of the nonfarm payrolls and its major sub-categories. The remaining six charts look closer at the divisions of the sub-categories: the "goods producing", "services and trade", and "government" sectors.

Primary nonfarm payroll

Figure 1, the "Primary nonfarm payroll" , shows that there were two major declines of payrolls within the time period. The first was in December of 1990, and the second in December of 1991. These two depressions are reflected in the total payroll trend lines (i.e., "All nonagricultural") but emanate mostly from the "total private" sectors and the "service producing" sectors. The government payrolls appear to have remained relatively constant throughout the time period. A decline of lesser magnitude in the "total private" line following June 1991 illustrates an additive effect resulting from slight declines in the service-producing and goods-producing sectors. There is a slight elevation of the line for the service sector in

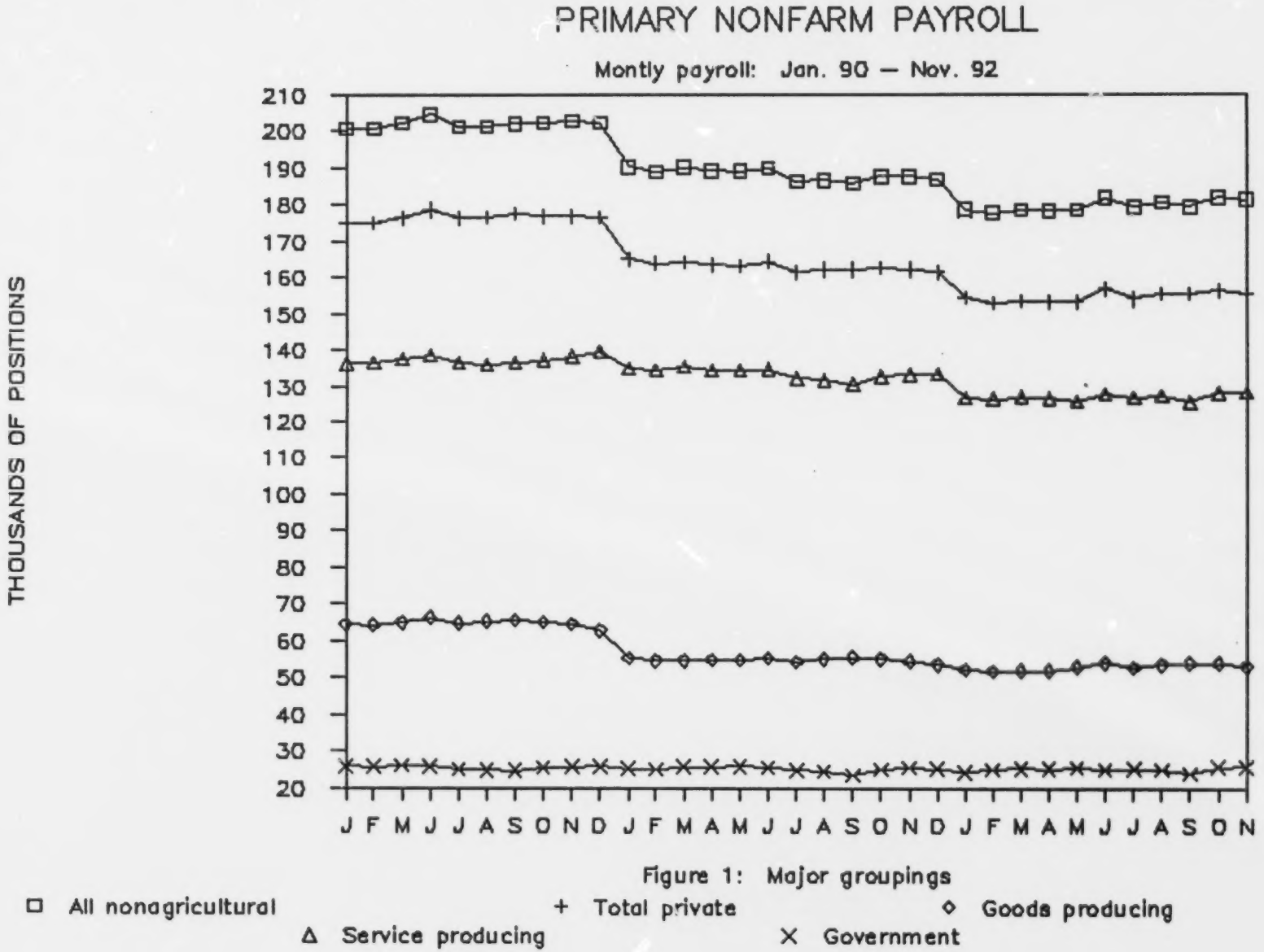

Figure 1: Major groupings

November of 1992.

The "goods producing" sector (Figure 2) explicitly shows the decline of December 1990 in its three major subdivisions: construction, durable goods, and non-durable goods; and they all reacted differently following the decline. The durable goods area steadily deteriorated; the nondurable goods sector leveled and began a recovery around April 1992; and, activity in the construction industry increased slightly during 1991, and continued until December. Construction increased again during 1992, however, the increases in both years may be attributable to seasonal variations. The net effect over the entire time period has been a reduction in the total number of positions on the construction payrolls.

The durable goods and nondurable goods sectors were then further defined so that a clearer understanding of the payroll activity contained within them, could be achieved.

durable goods production and construction.

Within the Department of Labor's taxonomy, the subdivisions of the durable goods producing industries are lumber, electrical equipment, metals, instruments, and machinery (Figure 3). All these industries experienced declines in December 1990, but when graphed, the data show that the instrument-producing industry has experienced the most severe and consistent decline within the three-year time period--plunging form over 9,000 positions to under 6,000[2].

The lumber industry, after having suffered a decline in December 1990 has remained relatively constant at about 1,000 positions. The metals industry appears to have declined only slightly, overall, since December 1990; and the electrical equipment industry, although experiencing fluctuations, has steadily declined. The machinery industry, also, has experienced a steady reduction in size since November of 1990.

nondurable goods.

The nondurable goods industries, as a whole, appear to have begun a turn-around in about March 1992. Although there were fluctuations during 1991, including the decline in

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[2] The definitions for the categories within the subdivisions can be found in the Standard Industry Classification Manual. Some of the definitions within the "instruments" category include devices used for scientific measurement and assessment, meteorological measurement, navigation, and clocks.

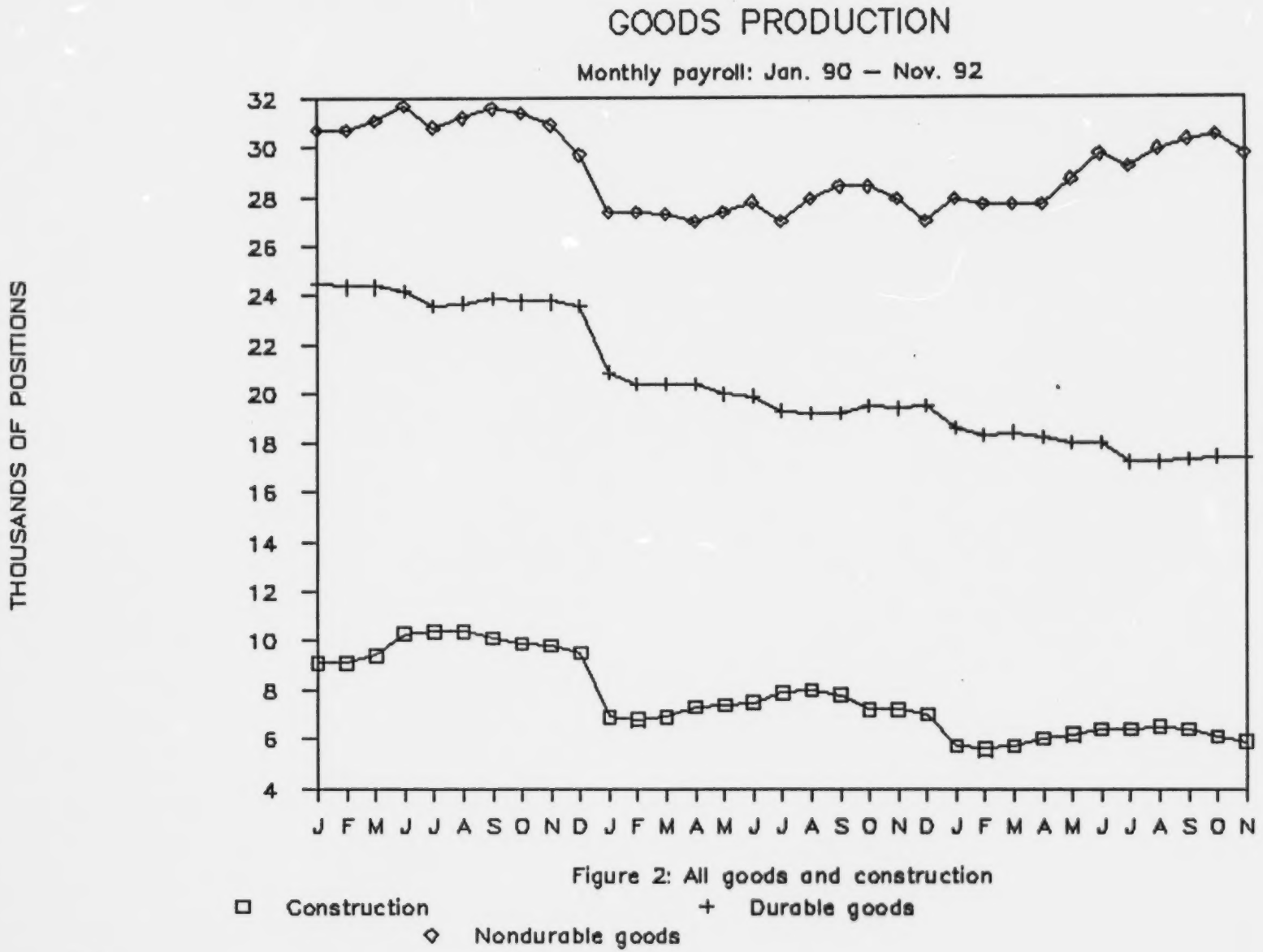

Figure 2: All goods and construction

DURABLE GOODS PRODUCTION

Monthly payroll: Jan. 90 — Nov. 92

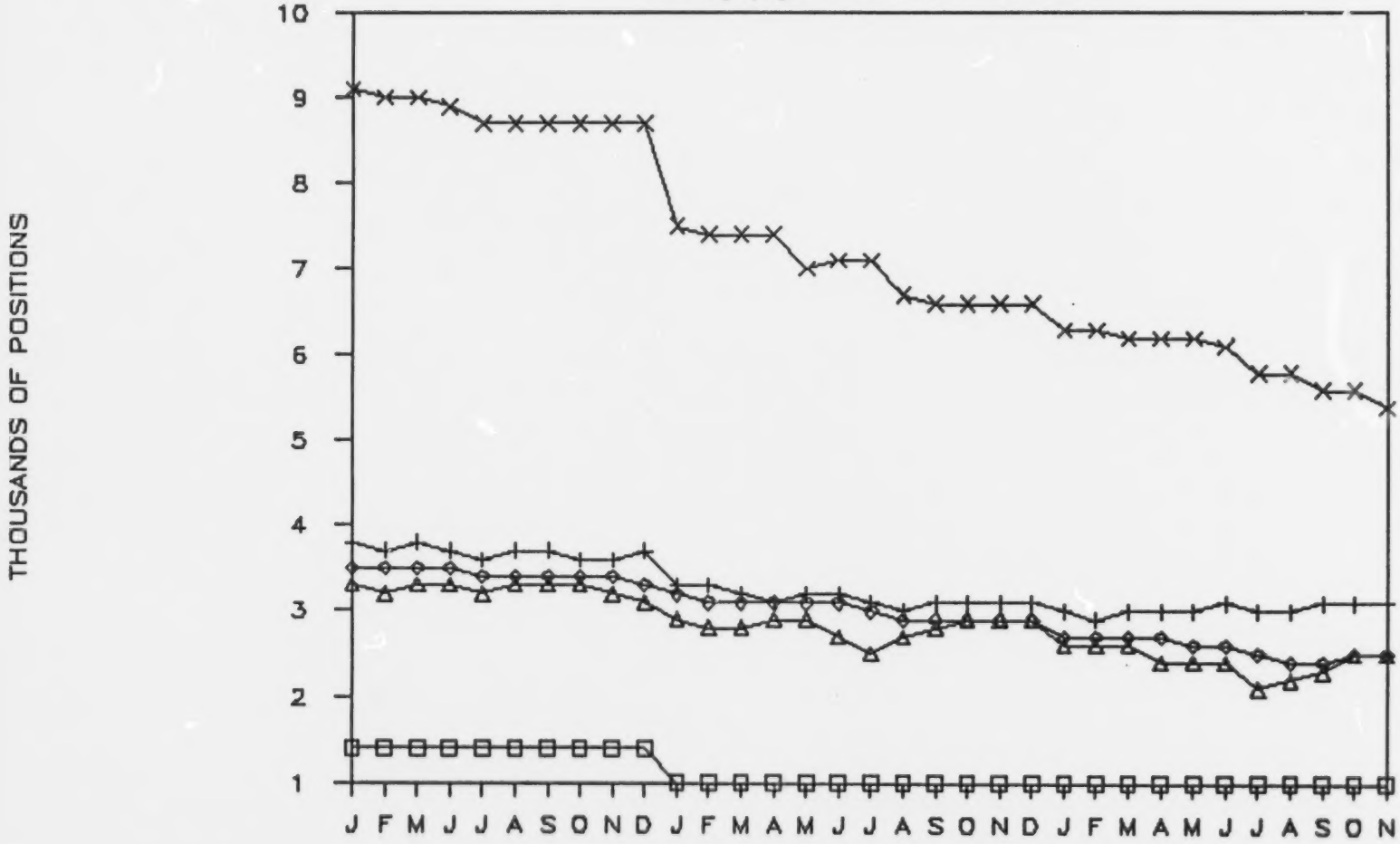

Figure 3:Lumber, metal, machines, ints.

□ Lumber,wood, etc + Metals ◇ Machinery

△ Elect. Equip × Instruments, etc.

December 1991, by November of 1992 this main subdivision had regained many of the positions that were previously lost (Figure 2). The subdivisions of the nondurable goods area are printing and publishing, rubber and plastic, chemicals, food production, apparel, and textiles. (These have been broken down into two separate charts--Figures 4 and 5--to avoid confusion resulting from too much information in a single graph.)

Figure 4 shows the areas of printing and publishing, rubber and plastic, and chemicals. The chemical industry seems to have regained some positions following a steady decline, and the turn-around appears to have begun around July of 1991. The December 1991 decline was not exhibited within this industry.

The rubber and plastic industry actually seems to have started its decline in September 1990 and began to recover in March of 1991. But this industry has wavered so much during the 1990-1992 time period that making a definite statement concerning a recovery is not possible with the present data. If the trend line were to be "smoothed" it might display no changes at all.

The printing and publishing industry did not experience a large loss in the number of positions on its payrolls when all of the others appeared to, in December of 1990, but started a steady decline around March 1991. It got worse during the first quarter of 1992 and appears to have been still going on in November of 1992.

The food, apparel, and textile industries (Figure 5) show a great deal of fluctuations. The textile industry (which according to the Department of Labor's taxa is "Textile Mill Products") experienced a large decline in January 1991, a slight increase later that year, three months of decline, and has remained stable throughout 1992 (although there is a suggestion of an expansion towards the end of 1992).

The food industry started suffering a huge loss in the number of positions around November 1990 that continued through March 1991. It rebounded somewhat until December 1991, then the "bottom dropped out". Since its low point, in February 1992, it has been consistently recovering

The apparel industry (which is "Apparel and Other Textiles" according to the Department of Labor's taxa) seems to have taken a real "roller coaster" ride since around November of 1990, but has recovered the positions that were lost, and more, especially since January of 1992.

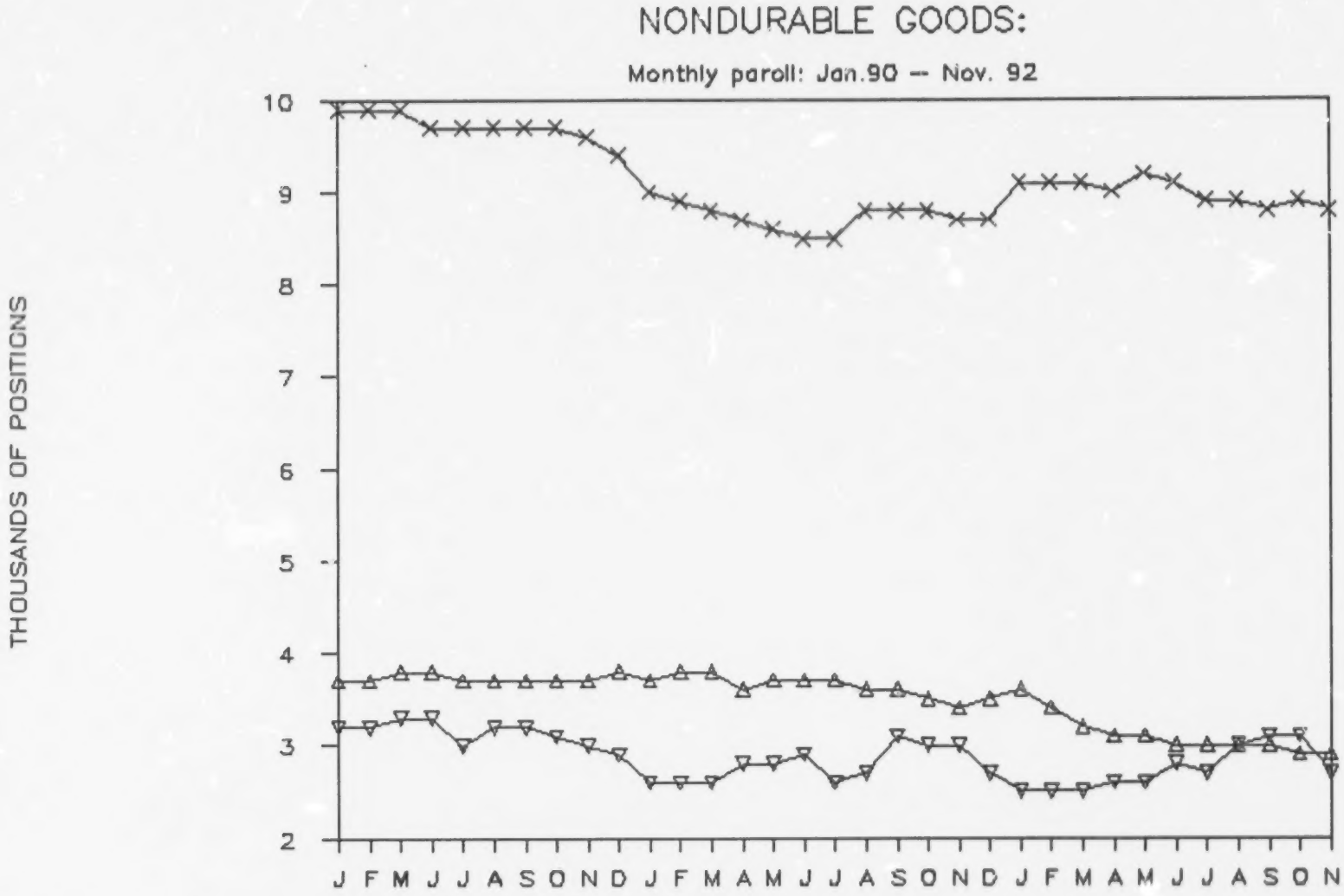

Figure 4: Chems, rubber/plastc, print'g

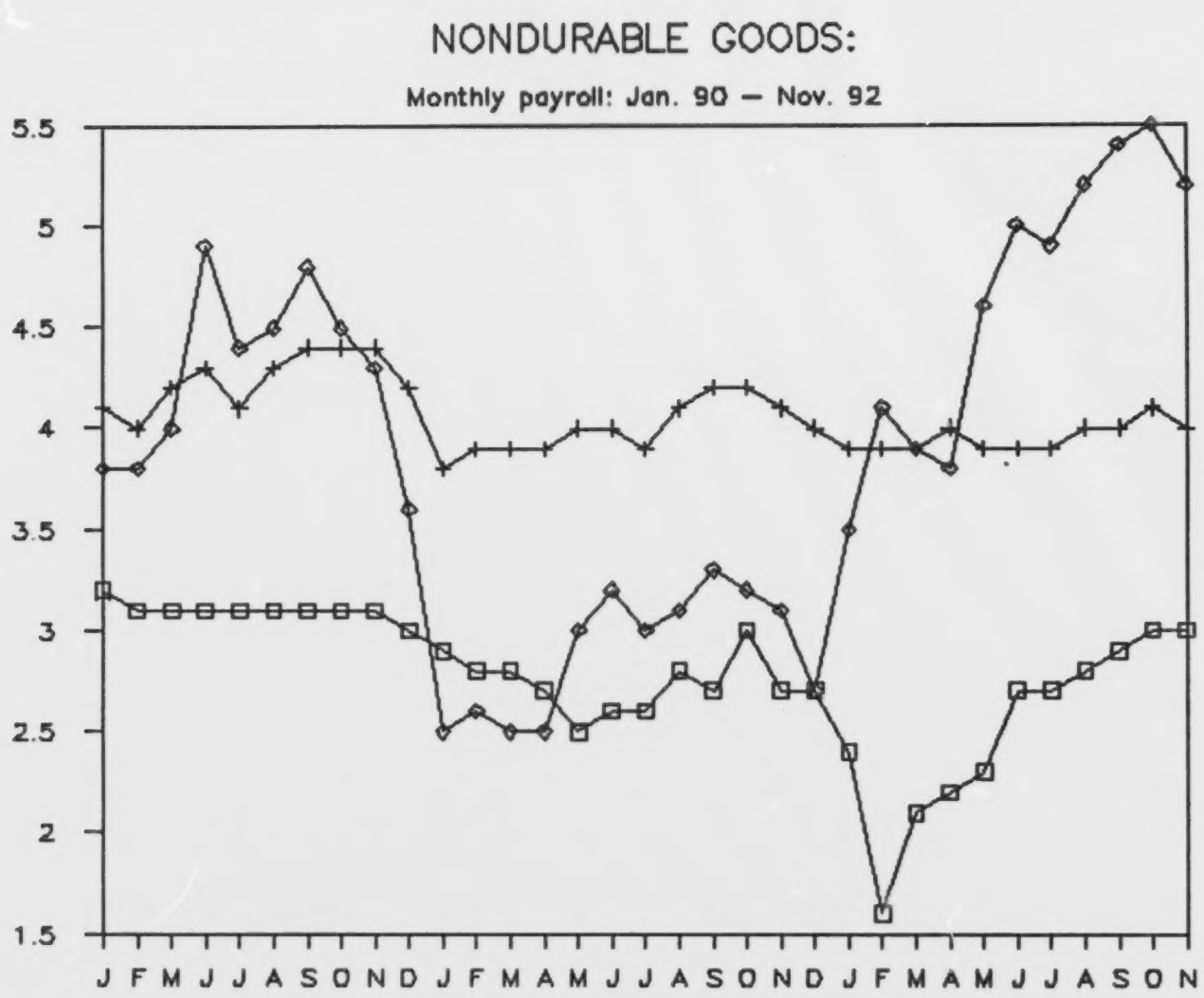

Figure 5: Food, apparel, & textiles

This may be one of the "growth industries" within the county because it acquired about 3,000 positions between January and October 1992. However, there was a loss of about 300 positions from October to November 1992. Because of this, the industry warrants watching--the observed effect may be the beginning stages of another series of job losses; the industry may be experiencing seasonal job decrement; the observed decline may be the result of a statistical artifact; or, some other cause may be producing this reduction in payroll size.

services and trade.

The industries that make up the retail trade component of this subcategory (Figure 6) suffered their largest losses beginning in December 1991, and again, it is too soon to tell if the upswing at the end of 1992 represents a real recovery that will result in regaining a substantial number of the lost positions. The two peaks in the graph were most likely seasonal aberrations, and the upturn of November 1992, may have been the periodic increment in these payrolls. The sharp decline in this sector in December 1991, was a major contributor to the decline observed for this subcategory in Figure 1. It is interesting to note that the losses suffered within most of the payrolls were not experienced in this industry. The retail trade area is the area with the greatest number of positions of all of the services and trades.

The wholesale trade industry has experienced a steady decline in the number of positions following the decline of December 1990 and does not seem, as of November 1992, to be regaining any of them. Also, the finance, insurance, and real estate businesses (often abbreviated F.I.R.E.) have been consistently losing positions since the end of 1990, and although there were slight recoveries in the Junes of 1991 and '92, they were not substantial or long lived.

Another industry that was not effected by the December 1990 "downturn" was the health service industry. This is the only industry that has had a consistent increase in the number of positions on its payrolls since January 1990, having grown by almost 2,000 positions. If not for this industry's steady expansion, the losses in Figure 1, in services and trade, would have been undoubtedly greater in both December 1990 and 1991.

The transportation and utilities industries have remained virtually unchanged within the time period, but there were slight increases and losses occurring throughout the time period. By November of 1992, there were approximately the same number of positions on the payrolls in

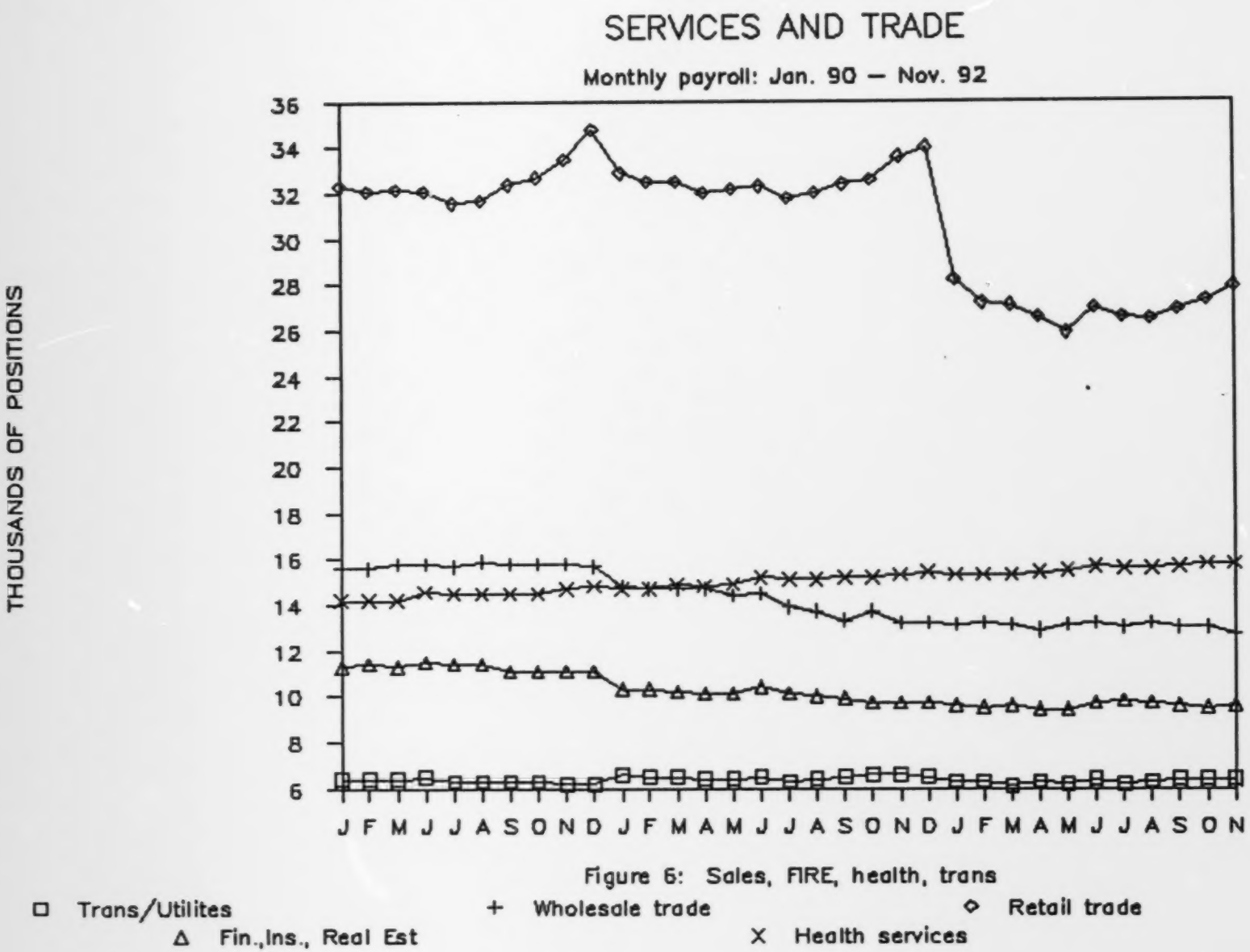

Figure 6: Sales, FIRE, health, trans

this industry as there were in January 1990.

government.

The local and state government payrolls have experienced fluctuations, with the local sector being more volatile than the state, and the state apparently more volatile than the federal (Figure 7). Also, the state payrolls were not as effected by whatever caused the declines in 1990 and '91 in the private sectors; and the federal payrolls do not appear to have been effected at all--between March and June 1990, about 50 positions were added but they were soon lost; the November 1992 data show that the federal payrolls were slightly below where they were in June 1990.

The local payrolls were the largest government payrolls in the county, and they showed the most variation--but there is the suggestion of a periodic decline around August or September. (There was also a decline that started around December of 1990. This is characteristically different from the private sectors' declines because the latter ended in December, the local government's began during that month.) There also appear to be repetitive increases that start around October of each year.

Unemployment rate

The unemployment rate[3] data (Figure 8) reinforce the findings that county payrolls had diminished in December of 1990 and 1991, and add a dimension that illustrates that many of those positions were held by county residents. Two points in time at which the county unemployment rates rose coincide with the declines in payrolls of 1990 and '91. In January 1991 the unemployment rate was almost two percentage-points higher than the previous January's; and by January 1992 it had increased by almost another two points. By July of 1992 almost 13% of the county residents were unemployed, and the sharp rise in the unemployment rate can be seen to parallel declines in the payrolls of the instrument, electrical equipment, chemicals, printing and publishing, and to a lesser extent, machinery industries. By October, however, the unemployment rate came down to less than 11%. There was a slight upturn in unemployment in November 1992, but further data are needed to determine the practical

[3] These data are based on the total county population and do not control for job-seekers and people not looking for positions; age, or other demographic criteria.

GOVERNMENT PAYROLL

Monthly payroll: Jan. 90 — Nov. 92

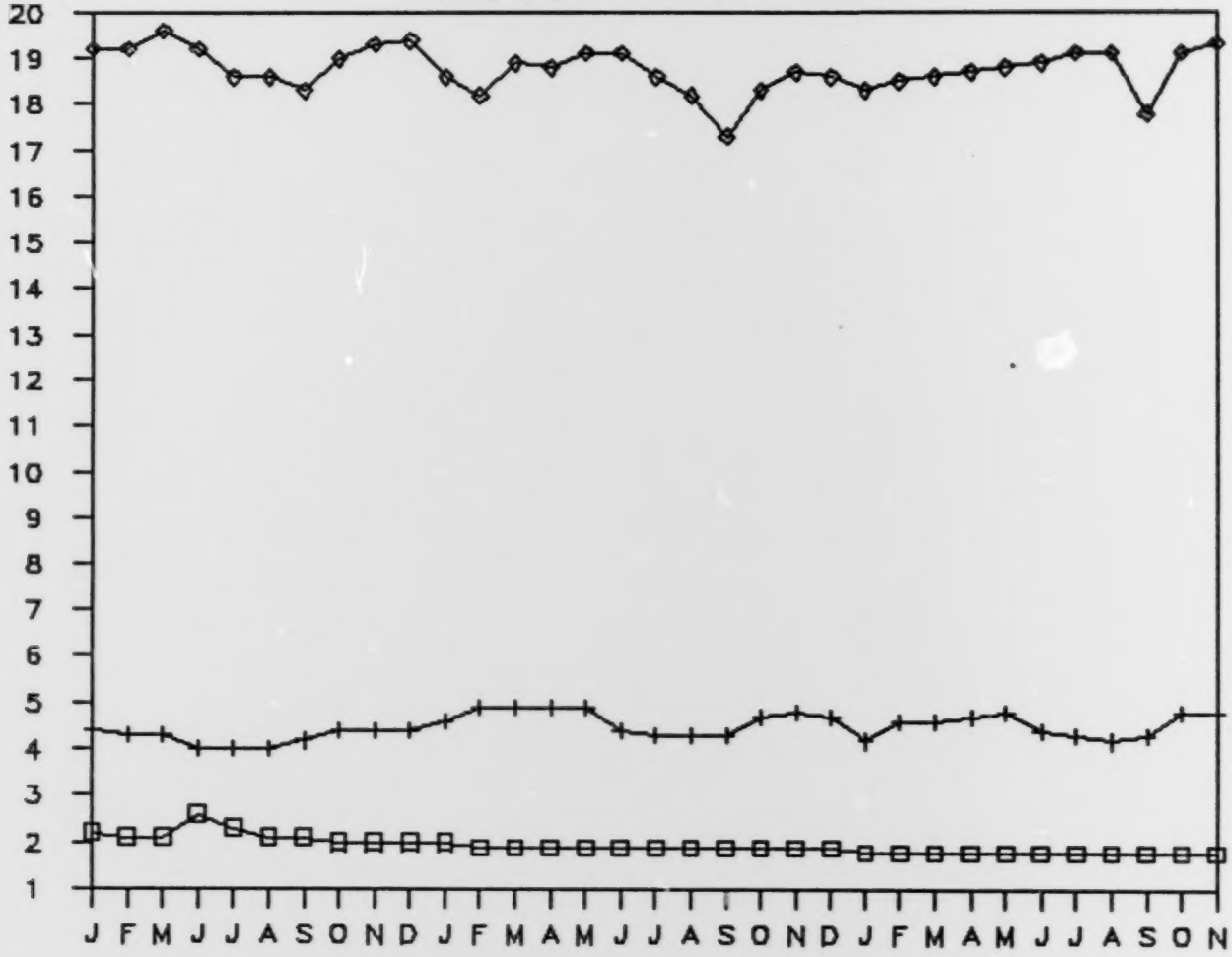

Figure 7: Federal, State, Local

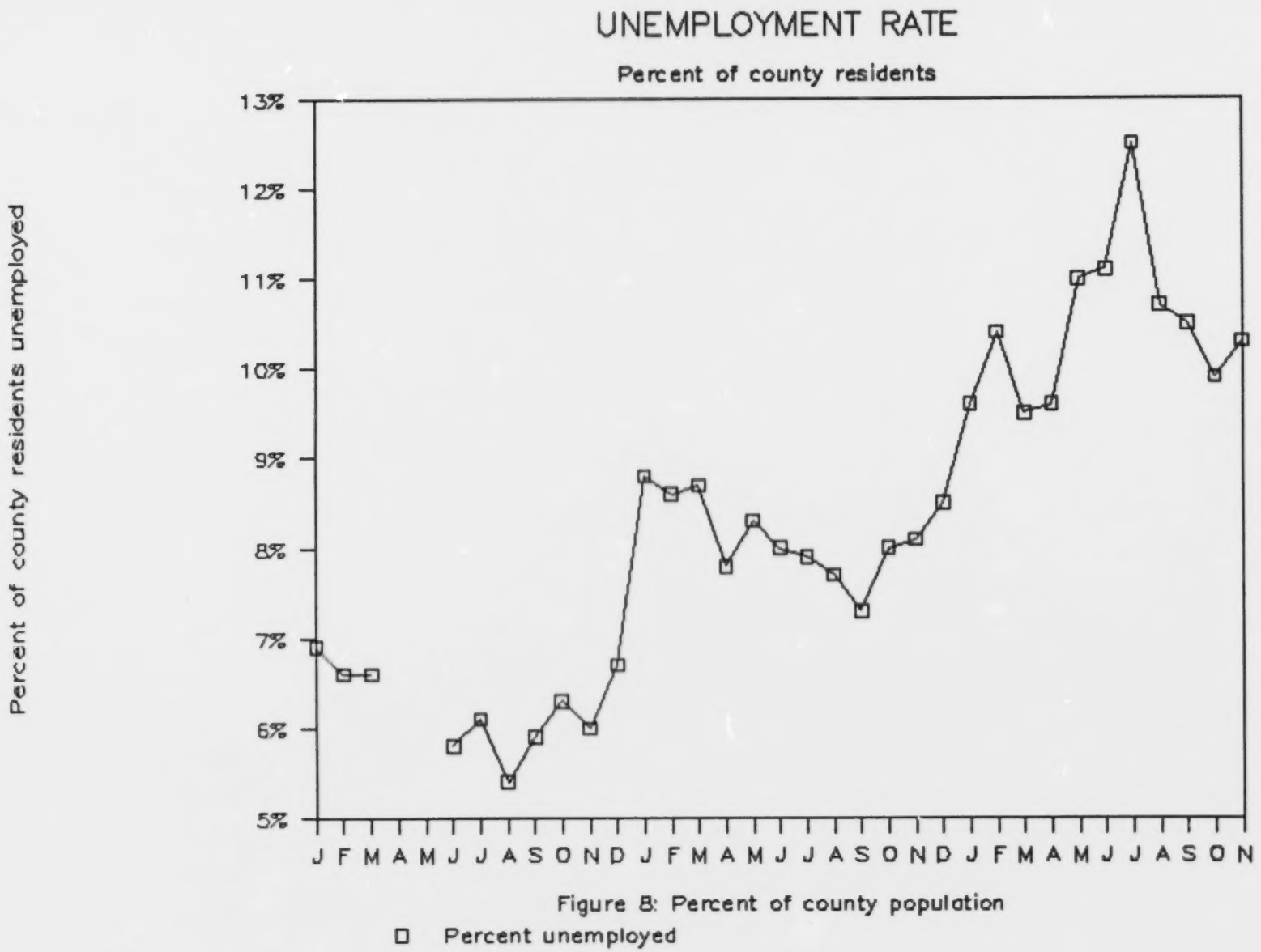
UNEMPLOYMENT RATE
Percent of county residents
Percent of county residents unemployed
13%
12%
11%
10%
9%
8%
7%
6%
5%
J F M A M J J A S O N D J F M A M J J A S O N D J F M A M J J A S O N
Percent unemployed

Figure 8: Percent of county population

significance of this statistic.

DISCUSSION

In December 1990 and December 1991, the county experienced two periods of major job loss within its primary nonfarm payrolls. The industries most effected were the goods producing industries in 1990, and the private service-producing industries, in 1991. Within the goods producing sector, the non-durable goods payrolls declined the most in December 1990 and the durables have exhibited the most consistent reductions since that date.

Further breakdown shows that the most severe losses were in apparel, textile, and chemical production, and the decrements started during different months. The losses observable in Figure 1, during December 1990, are partially attributable to the combined effects of losses that actually began in September (apparel, rubber and plastic), October (chemical), and November (textiles and food). One problem inherent throughout the present study concerns any trends that are observed. The data, compiled since 1990, might be illustrating declines or expansions of trends already in progress. What seems to be starting in December 1990 may have actually started at some point prior to that date. The acute declines that are observed may only be one in a series of declines, or the first of a series.

There was an increase in the total private payrolls in June 1992 which can be attributed to the combined increases from all of the components except the durable goods industries and the printing and publishing sector of the non-durable goods industries. The food producing industries and the apparel industries seem to be growing the fastest, but they had lost a great many positions during the years of study. Some industries appear to grow and then decline again, such as rubber and plastics, chemicals and F.I.R.E. And other industries, after fluctuating, seem to be back to where they were in 1990, e.g., textiles. The durable goods industries and construction are still declining.

Predictions are difficult for industries such as rubber and plastic, and textiles which have been very volatile and experienced many fluctuations during the time period; and also for the retail industry, which is the largest industry in the county. The apparel and food industries, both of which lost many positions, have recovered many of those that were lost during the time involved in the study.

Looking at some of the industries as unique may be a shortcoming of the data. Industries such as printing and publishing, which began its decline in the early months of 1991, may have lost positions because they are dependent upon other industries which started losing positions earlier within the timeframe. The timelag between the start of the overall decline, in December 1990, and the one experienced by these particular industries may have been the result of decreases in the need for their services--especially in view of the finding that the declines were continued and exacerbated following the decline of December 1991. In the same way, retail trade may have been dependent on the wholesale trade industry, and more complex relationships may also exist such as retail trade dependancy on all goods manufacturing. As manufacturing payrolls decline, the unemployed workers stop purchasing which, in turn, can cause a decline in retail trade payrolls.

Many of the people who lost their jobs were county residents, as was demonstrated by the percentage of county residents who were unemployed following the payroll declines. Two questions arise from these analyses: 1) What skills do the people who were, and remain, unemployed posses; and, 2) what skills will they be needing in the future? An answer to the latter question may lie in the industries that have been experiencing growth--health, food, apparel--and others that are receiving an influx of special-program incentives, e.g., urban enterprise zones, etc. (i.e., local, state, and Federal political programs being put into place in the near future to help ameliorate some of the financial problems of the county).

Part III: Chamber of Commerce Survey

METHOD

In 1991, a survey was developed by an ad-hoc committee of the Strategic Planning Committee which was charged with performing an environmental scan. The survey was mailed to members of two of the local chambers of commerce, the Greater Paterson Chamber and the Passaic-Clifton Chamber as a "piggy-bag" mailer--an enclosure with the monthly mailing of the chambers that include advertisements and schedules of events within the areas served by the chambers.

Over 2,000 surveys were mailed. Sixty one usable responses were received, representing a response rate of approximately 3%. (A copy of the survey is in the Appendix A).

RESULTS

Most of the respondents were representatives from some type of service-producing industry. Fifteen respondents (25%) said that the type of business in which they were engaged was either construction, durable goods production, non-durable goods production or printing (Table 1). There was an "other" option in the choices of responses which asked for a specification of what that other was, if it was selected. Thirteen people chose that category. Of that thirteen, only three could be categorized as something other than a service industry (one printing/publishing, one mechanical, and one electronic--which are usually considered goods production industries). The total, then, is about 30% non-service-related industries responded.

Table 1
Primary function of organization

	No. of Respondents
Communication	4
Consultant	4
Durable goods	7
Health care	5
Retail	4
Textile	1
Service	12
Construction	1
Finance	1
Insurance	2
Printing	4
Real estate	6
Non-durable goods	3
Wholesale	2
Other	13
Total	69

When questioned if they had ever hired a PCCC student or graduate, 17 of the respondents answered that they had (27.9%). When asked if they had ever paid for an employee to attend some kind of training or professional-development activity, 39 responded that they had

(63.9%). But only two came to PCCC[4]. The types of training that most employers sent employees to attend was computer-related followed by F.I.R.E.-related (finance, insurance and real estate), and secretarial. However, that represents only 42% (N=16) of the respondents stating that they sent employees for training. The other 52% (N=20) of the responses were too varied to permit aggregation, and were very specific to the responding organizations.

The types of industries that sent their personnel for training can be found in Table 2. It can be seen that durable goods manufacturers, health industries, real estate, and consulting firms most frequently sent their employees for some type of developmental activities.

Table 2[5]
Types of industries sending personnel for training

Industry	Frequency
Communication	2
Durable goods	6
Health	4
Retail	2
Construction	1
F.I.R.E.	6
Finance	1
Insurance	2
Real Estate	3
Non-durables	2
Wholesale	1
Other	
Day care/preschool	2
Electronics	1
Mechanical	1
Staining	1
City Planning	1
Consulting	3
Legal	1

[4] The two types of business that stated they sent people to PCCC for some kind of training were a communication institution and a health institution. Unfortunately the type of training was not specified by the respondents.

[5] The total of this table does not equal the figure cited as being the number of organizations sending employees for training due to respondent error.

(Table 2, con't.)

Publishing	1
Social Work	1
Elevators	1
Accounting	1
Job Assessment	1
Medical	1
Payroll	1
Skills	1

A piece of information that the present survey did not capture entails how many employees per year per organization were sent for training.

When employers were asked if they were familiar with the training and educational offerings at PCCC, 18 (29.5%) responded that they were familiar with the offerings. When asked to rate the educational offerings at the College (using a scale with "1" being poor and "5" being excellent), 94% of those familiar with PCCC programs gave an average or better rating (Table 3).

Table 3
Rating of PCCC offerings: 1 = Poor to 5 = Excellent

Rating	Frequency
1	0
2	1
3	11
4	4
5	0

Two stating that they were familiar with PCCC offerings did not rate them, that is, they did not respond to the question.

When asked what types of skills they would like future employees to posses the respondents replies varied greatly, but some were able to be aggregated into major categories. One of the most frequently elicited responses had to do with verbal and communication skills, which received six responses. Six responses were also attributable to a technical/mechanical category, five responses in a secretarial/clerical category , and a general category in which the

respondents stated the skill would depend on the job or job description which received four responses. And computer skills, as a general category, received three responses. Twenty survey respondents responded with skills that could not be aggregated, and fifteen people did not respond to the question.

There was also a great deal of variation in the size of the responding institutions. Because of this, size categories were created to make the data more manageable and meaningful. Most of the institutions were small, having less than 100 employees (Table 4). The average number of employees per responding institution was 90, but that is not an accurate representation because two organizations reported having over 1000 employees. The presence in the sample of such extreme responses has the effect of inflating the average. A more precise indicator is the median size--the size of the institution at which half of the responding institutions lies below and half lies above. The median number of employees for this group of responding organizations is 16 employees; and the number of employees per organization reported most frequently (the mode) was two (reported by six organizations).

Table 4
Number of employees at responding institutions

Number	No. of organizations
1 - 9	18
10 - 19	9
20 - 39	8
40 - 59	6
60 - 99	4
100 - 199	4
200 above	5

When employers were asked if they were planning to expand their organizations in the near future, 14 responded that they did plan to expand (26%) (Table 5). The types of industries responding with the greatest frequency as planning expansion were consulting (the type of consulting was not indicated) and real estate.

Table 5
Type of business of planning expansion

Type of business	Number
Communication	1
Real estate	3
Non-durable goods	1
Service	
Consulting	4
Postal	1
Job assembler	1
Shopping	1
Accounting	1
Travel	1
Publishing	1
Storage	1

Included in the survey was a question that asked if the respondents would like more information about the types of offerings and programs offered at PCCC. The names and addresses of respondents requesting more information were compiled into two list--one list of those wanting information of regular credit-bearing offerings, and another of those requesting information about continuing education offerings. These lists were sent to the Admissions Office or the Continuing Education Office, respectively.

DISCUSSION

The survey received a low response rate, but it is not one that is incomparable with other surveys of this nature. A similar survey was reported in *The Star Ledger* on 28 October 1991. The Metro-Mewark Chamber of Commerce was surveyed by Seton Hall University's Master of Arts Program in Corporate and Public Communication. It received a response rate of 3.9%, only .9% higher than the PCCC survey. This demonstrates that the low rate of response to the PCCC survey does not reflect a methodological problem, or some other problem with that particular survey, but rather the possible presence of a factor that leads to low response rates when surveying chambers of commerce.

There were other similarities between the two surveys. Some of the basic reasons for performing the surveys were comparable. Both wanted to know what factors employers would be looking for when making judgements concerning future employees. A difference between

the two surveys was that the Seton Hall study was more generic with regard to factors related to overall educational preparedness of high school and college graduates. The PCCC survey inquired about employer knowledge of PCCC programs and services, as well as skill levels and knowledge employers will be seeking in future employees. The PCCC survey also asked about expansion plans and size of the responding organization.

An important similarity was obtained within the results of both surveys. Both surveys found that a key feature employers would be looking for in future employees was communication skills, written and oral/verbal. A factor identified by the Seton Hall survey was termed "knowledge of the company or industry" which can be considered to be analogous to the PCCC survey's finding of employers looking for mechanical or technical skills and skills "related to the job description". Both surveys also found that employers desired future employees to have computer skills; and the PCCC survey received responses from employers seeking specific types of skills such as secretarial/clerical skills.

The Environmental Scanning sub-committee was disheartened with the finding that only 30% of the respondents were familiar with the PCCC course offerings, and that only two of the thirty-nine organizations that paid for their employees to receive training sent their employees to PCCC. Most of the employers who sent their personnel for training sent them for computer skill enhancement. It is not known from the results of the survey whether this training was in the form of a 2-3 day seminar sponsored by one of the many private personnel-development companies, or semester-long courses at business or computer proprietary institutions. The survey also did not discover the related information concerning whether the course was one in which the participant accumulated continuing-education units (c.e.u.'s), college credit, or no credit at all. These same information is absent from the respondents who sent their employees for F.I.R.E. and secretarial courses.

Some interesting information can be obtained when Tables 2 and 3 are combined (Table 6). From this table we can see the number of organizations that sought to develop their personnel, by type of organization. Although the categories are broad, i.e., communications, consultation, and durable goods manufacturing, and the numbers small insight into the types of industries that can be targeted for follow-up research can be obtained.

Table 6
Respondents who sent personnel for training

Type of Organization	Sent employees for training
Communication	2 of 4
Consultant	3 of 4
Durable goods	6 of 7
Health care	4 of 5
Retail	2 of 4
Textile	0
Service	0
Construction	0
Finance	1 of 1
Insurance	2 of 2
Printing	1 of 4
Real estate	3 of 6
Non-durable goods	2 of 3
Wholesale	1 of 2
Other	Information from here has been incorporated in the above

Part IV: Focus Groups

METHOD

A second project undertaken by the Environmental Scanning sub-committee took place following the annual spring Job Fair, in 1991. Focus groups, made up of recruiters from the participating organizations, took place directly after the Fair. The groups were moderated by members of the sub-committee. Four questions and a set of brief instructions were formulated for moderators to use in stimulating and guiding the groups' discussions (Appendix B). Five groups were established, and although the intent in the construction of the groups was to keep businesses with similar orientations together, when the time came to actually hold the group sessions, many individuals cancelled and other recruiters had to obtained from the Fair to replace them. The result was that most of the groups were very heterogenous in their make-up. One group was unique in that all of the participants represented an organization in the health care industry. The conversations of four groups were tape recorded for transcription and analysis; the leader of the fifth group took notes.

RESULTS

Only two usable tapes resulted from the focus groups. The transcripts from these groups were discussed at a Sub-committee meeting. Common themes were identified that centered around recruiters looking for people who would be dedicated and reliable workers, personable, with the ability to demonstrate concern for clients and others that they would come in contact with in the course of their work. The recruiters were also looking for people possess basic mathematical and language skills. Similarly, the need for communication skills in business environments, such as on the telephone and when acting as a representative of the establishment for which they were employed, were brought up. One of the most salient points that came out of the focus groups pertained to dress. The recruiters felt that many whom they encountered at the Fair were not dressed as if they were ready to interview for a job or present themselves for a job. Another striking point pertained to attitudes and expectations of the students. The recruiters perceived that many expected higher-than-entry-level pay and seemingly excessive "perqs" to be granted them.

The focus group that was constructed of health industry representatives, mostly hospital recruiters, spoke of the need for people who could relate to people, i.e., people with a sympathetic "bedside manner", and they spoke about a great many people who misrepresent themselves when applying for a job. This was discovered by supervisors who had observed their activities. This problem, some of the recruiters said, was especially acute with regard to nursing assistants and medical technicians. (The quality of this tape was poor, but the moderator of the focus group was able to understand it because he experienced the discussion first-hand and wrote down notes during the session.)

The recruiters also spoke of emerging needs for bilingual health practitioners, physical therapists, medical records transcribers, and the other "ancillary people that keep the health facilities running". A key component of bringing people into the newly emerging health-industry fields, the recruiters agreed, is advising high school and college students about the opportunities that are opening up. The recruiters felt many students would like to go into a health-related field, but think the only route is through medical schools. The recruiters believe that students are unaware of the other opportunities that exist and the potential for advancement; and that the traditional means of judging a high school by the number of students who continue in four-year

colleges, negatively impacts on the advice guidance counselors give students towards pursuing more vocationally-oriented health fields.

When asked if they do any in-house training, about half of the participants, in all of the groups, responded that they did do some kind of training within their organizations. The remainder stated that they had either sent their employees out to receive training, or did none at all.

Part V: Recent High School Graduates

METHOD

Data outlining the twelfth-grade enrollments and subsequent June graduates for the five-year time period between 1988-1992, were collected from the N.J. Department of Education and tabulated (Table 8). The table shows that there was a decline in high school twelfth-grade enrollment in Passaic County from 1988 through 1991, but the decline appears to have stopped. In 1992, the Fall high school enrollment was at approximately the same level as the preceding year. Concurrent with that, the numbers of high school graduates in the County declined through the same time period. Since the number of graduates is a function of the twelfth-grade enrollment, it remains to be seen as to whether the decline in graduates has stopped--the June 1993 graduate data are not available as of this writing.

The numbers of County high school graduates from those classes who enrolled at PCCC directly from high school has been included in the table. It can be seen that in the Fall of 1990 there was a one percent increase in the proportion of recent high school graduates who enrolled at PCCC, from 3.6% to 4.6%. An increase of approximately two percent occurred in 1991, from 4.4% to 6.4%; and in 1992 the percentage of enrolled high school graduates was about the same, 6.3%.

Table 8
High school data

County H.S. 12th Grade Enrollment As of September

Year	92	91	90	89	88
Total	3657	3648	3705	3885	4141

June High School Graduates

Year	92	91	90	89	88
Total	3485	3582	3765	3969	4279
Percent of enrollment	95.5%	96.7%	96.9%	95.8%	

Recent High School Graduates:
Enrolled Same Year As H.S. Graduation

Grad Date:

Year	92	91	90	89	88
Total	220	231	173	141	155
Percent of graduates	6.3%	6.4%	4.6%	3.6%	3.6%

DISCUSSION

There has been mention in the popular press of the declining number of high school students. This has been attributed to the aging of the "baby-boom" generation. There is also speculation that another "boom" may be providing students in the near future. If either one of those phenomena have occurred in Passaic County the current data only hint at them. What is apparent is that a larger number of traditionally-aged students, i.e., recent high school graduates, enrolled at PCCC since 1989. The cause may be attributable to several factors. One factor may be the unemployment rates and poor economic conditions of the county. High school students

may have realized that they need more than a high school education to start their careers--this no doubt would have effected some county high school seniors. Other seniors, who were planning on college, may have opted for a community college because of the affordable price of the education--again the economics of the county impacting on their decisions. The economics may have impacted in a third way, too. Those students who could have preferred to work may not have been able to find a job, so they continued their educations at PCCC.

Another factor may have been increased recruiting and relationship-building with the high schools. High school students who were college-bound may have been indecisive about what they wanted to study and enrolled at PCCC while they made their decisions - trying different areas of study to see which they liked best.

An unknown concern those students that did not enroll at PCCC but went away to college. What areas of study are they interested in and what can PCCC do to offer courses in those disciplines if needed.

CONCLUSION

Some interesting facts emerge from the analysis of the foreign-born students that attended the College in the Fall of 1992. The total number was 1,860 people (see table "Birthplace of Foreign Born Students"), representing about 50% of the student population (eliminating continuing education students). The highest percentage was from South America (38%), most notably Peru--which is the most highly represented country among the foreign-born students--and Colombia. The second highest area represented was the Caribbean--with many students originating from the Dominican Republic, Puerto Rico, and Jamaica-- followed by the Middle East, and Eastern Europe, which appears to be the fastest growing area from which students are arriving. Although it is interesting to know from where foreign students are coming, the important fact is the recognition of the magnitude of that student population on campus and its rate of acceleration. In the Fall of 1992 it grew by eleven percent and in the two previous years by over seventeen percent each year--does this mean the rate of growth of that student group is slowing? This should be monitored so that the institution can plan accordingly, especially since

the county's immigrant population was found to share certain problems with the non-migrant impoverished members of the County.

The economic data showed that the durable goods manufacturing segment of the county's industries have been declining for the last few years and that the non-durable goods industries, after intitially suffering a decline, have been rebounding. A portion of this was attributed to the increase in apparel manufacturing. This finding is reinforced by an observation related by Mr. Richard Harter, who was the Senior Planner in the Office of Economic Development of the City of Passaic, in 1991. In a personal communication, Mr. Harter told that he had observed many small firms that manufactured clothing renting loft space in downtown Passaic and hiring newly-arrived immigrants to produce the clothing. These firms, he said, were taking advantage of the low rents and "cheap labor" available in Passaic. When he asked what skills or training these firms would like to see their employess acquire he was told "language skills". These firms can be seen to be filling a void resulting from the closing of major national garment-producing factories in the Paterson/Passaic area. Further analysis and tracking of other industries, for example the instrument-producing, electrical equipment, chemical, and service industries can provide information such as profiles of the unemployed and their skills, and the skills that emerging industries are going to require of their employees. The impact of the State and national political agenda will also be felt in the county's economic performance, as will technological advances and the symbiotic relationships that exist between industries.

Not only do unemployed adults have to develop new skills to adapt to a changing work environment, high school students have to further develop their skills in and knowledge in the academic and vocational areas that interest them. And some may not have solidified particular areas of interest. Unfortunately, too, too many high school students graduate without sufficient skills to obtain an entry-level job, and many entry level positions require more than a high school education. This is especially true in the service industries, which were found to employ more employees within the county than any other segment of the non-farm payrolls. Whether the high school students of Passaic County are children of newly-arrived immigrants (and are, therefore, immigrants themselves), first-generation offspring, or progeny of long-time county residents they will need more than was provided them in high school to be successful. By providing academic and career programs that are attractive to those students, as well as

programs that appeal to the older non-traditional students, that also serve the emerging industrial needs of the County, Passaic County Community College can continue to enhance the well-being of the County, and beyond.

Appendix A

PASSAIC COUNTY COMMUNITY COLLEGE • 684-6800
COLLEGE BOULEVARD, PATERSON, N.J. 07509

April 30, 1991

Dear Chamber of Commerce Member,

Passaic County Businesses are currently being faced with many challenges that reflect changes in the way business is conducted today and will be conducted in the not-so-distant future. Because of this, Passaic County Community College is conducting a survey to identify the training needs as you perceive them. The results of the survey will enable the College to develop programs that specifically address these needs. Please help us to help you by taking a few minutes to complete the enclosed postage-paid card and return it to us as soon as possible.

If you have any questions concerning this survey, please do not hesitate to call our Director of Institutional Research, Dr. Arthur Kramer at 684-6741.

Thank you in advance for your prompt response and cooperation.

Sincerely,

Elliott Collins

Elliott Collins
Interim President

EC/AK:ic

Have you ever hired a Passaic County Community College student or graduate?
( ) Yes ( ) No

If yes, would you do so again ?
( ) Yes ( ) No

Have you ever paid for an employee to attend a skills-upgrading training workshop, seminar or any other type of professional development activity ?
( ) Yes ( ) No

What type of training was that ?

_____

Was it at Passaic County Community College ?
( ) Yes ( ) No

If not, where was it ? _____

Are you familiar with the training and educational offerings at Passaic County Community College ?
( ) Yes ( ) No

If so, how would you rate them ?

1 2 3 4 5
Poor Excellent

If not, would you like further information ?
( ) Yes ( ) No

If you would like more information regarding PCCC options, please check the type of information and complete the following section

Customized on & off site ( )
Regular offerings ( )
Continuing education ( )

Contact person _____
Title _____
Telephone number _____

Are you planning any type of expansion in the near future ?
( ) Yes ( ) No

How many people do you currently employ ?

_____

What entry skills will you be looking for in the future ?

_____

What is the primary function of your organization ?

( ) Communication
( ) Construction
( ) Durable Goods, Manufacturer
( ) Finance
( ) Insurance
( ) Health Care
( ) Real Estate
( ) Mining
( ) Non-Durable Goods, Manufacturer
( ) Retail Trade
( ) Textile
( ) Wholesale Trade
( ) Transportation
( ) Other
( ) Service
Specify _____
Specify _____

Name of person filling this out:

_____

Name of company: _____

Address _____

Appendix B

START BY HAVING EACH PARTICIPANT INTRODUCE HIM/HER SELF BY GIVING THEIR NAMES; THE NAME OF THE COMPANY/ORGANIZATION THEY REPRESENT; THE TYPE OF ORGANIZATION OR BUSINESS IT IS; AND, THE NUMBER OF EMPLOYEES IT HAS.

(DON'T FORGET TO INTRODUCE YOURSELF!!)

QUESTION 1:
When you hire people, or interview people, what kind of skills are you looking for?

QUESTION 2:
Of the people you've hired recently, say within the past year, have you seen any skill deficiencies, and if so, what are they?

Again, if so, what do you do about them, for example, do you train them internally or do you send them out for training?

QUESTION 3:
What is your company's policy towards the professional development of employees , for example do you provide literacy training or English as a Second Language (ESL) for employees that need those skills developed, or management and interpersonal skills training when you intend to promote employees?

As a last question:
What technologies do you see being introduced into your fields now and is your company incorporating them or planning to incorporate them in the near future?